



Office of Accounts and Reports

2020 W-4 Overview & SHARP Updates

12/19/19

Agenda

- ▶ IRS 2020 W-4 Form
- ▶ SHARP W-4 Impacts
 - ▶ Fed Tax Data
 - ▶ Employee Self Service
 - ▶ Transition Timeline
- ▶ Payroll Reminders

IRS 2020 W-4 Form

2020 W-4 Form – General Info

- ▶ Existing employees are **not** required to complete a new form
- ▶ Required for all new or existing employees completing a Federal W-4 form on or after Jan. 1, 2020
 - ▶ Withholding allowances are no longer used
 - ▶ New form provides options for more accurate tax withholding
- ▶ Final version of the new form was released by the IRS on December 4th
- ▶ SHARP/ESS updates are being tested and are currently targeted to be applied on December 30th

2020 W-4 Form – Details

- ▶ New form is divided into 5 steps:
 - ▶ Step 1 (personal information and filing status) and Step 5 (signature) **are required**
 - ▶ Steps 2 - 4 may be used to establish a more accurate tax withholding
 - ▶ Allows for consideration of multiple jobs (Step 2), dependent tax credits (Step 3), and other adjustments (Step 4) in calculations
- ▶ New employees who fail to complete a W-4 will be treated as Single with no other adjustments
- ▶ If completing only Steps 1 & 5, withholding is based on the standard deduction and tax rates for the filing status selected
 - ▶ Single or Married filing Separately/Married Filing Jointly/Head of Household

2020 W-4 Form - Details

- ▶ Steps 2, 4a, and 4c if completed, will increase Federal tax withholding; completing Step 3 or 4b will decrease Federal tax withholding
- ▶ An employee may consider increasing Federal tax withholding if:
 - ▶ The employee holds more than one job at a time or both the employee and their spouse have jobs (Step 2)
 - ▶ The employee has income from sources other than a job that is not subject to withholding (Step 4a)
- ▶ An employee may consider decreasing Federal tax withholding if:
 - ▶ The employee is eligible for income tax credits such as the child or other dependent tax credit (Step 3)
 - ▶ The employee is eligible for deductions other than the standard deduction (Step 4b)

2020 W-4 Form - Details

- ▶ Per the IRS, Step 2 allows the employee to choose one of three different options for more accurate withholding, which include tradeoffs between accuracy, privacy and ease of use:
 - ▶ **Option 1 (Step 2a):** Most accurate/private option – Use the Tax Withholding Estimator at www.irs.gov/W4app and enter additional amount on line 4c
 - ▶ Allows employee to identify the extra withholding amount to enter on line 4c without revealing additional jobs/income information to their employer
 - ▶ **Option 2 (Step 2b):** Uses Worksheet 1 on page 3 of the W-4 form to provide roughly accurate withholding without use of the online Tax Withholding Estimator – calculates additional amount to be entered on line 4c
 - ▶ Note: If either option 1 or 2 are used and the pay changes for any of the jobs used in the calculation a new W-4 will need to be completed to have accurate withholding
 - ▶ **Option 3 (Step 2c):** Easiest option – check box if only 2 jobs are held in household
 - ▶ Least accurate and may result in overwithholding but generally will not result in underwithholding
 - ▶ Reveals to the employer that multiple jobs exist in the household

2020 W-4 Form – Exempt Status

- ▶ An employee is eligible to claim Exempt status if the following criteria are met:
 - ▶ Employee had no income tax liability in the previous year
 - ▶ Employee anticipates no income tax liability in the upcoming year
- ▶ Listing of employees with 2019 exempt status was provided to SHARP agencies on or about Dec. 2, 2019 via the agency worklist
- ▶ In the SHARP Infolist message issued 12/16/19 agencies were provided detailed language to use to notify employees seeking to claim Exempt status for 2020 of the necessary actions required to claim exemption – please ensure that information is communicated to employees!

2020 W-4 Form – Exempt Status

- ▶ To ensure exemption from withholding is effective with the first paycheck in 2020, employee may claim exempt status using one of the following methods:

Option 1: Submit a completed paper 2020 W-4 Form to agency HR/Payroll office: Individual should write 'Exempt' in the space below Step 4(c) and complete steps 1a, 1b, and 5

- ▶ **Agency HR/Payroll staff must enter 'Exempt' status forms in SHARP between Mon, Dec. 30th and Fri, Jan 3rd at 6p with an effective date of January 2, 2020 for first paycheck in January**
- ▶ **NOTE:** IRS instructions do not allow an individual claiming exemption to request extra withholding in Step 4(c) of the 2020 W-4 form

Option 2: Employee may complete a new 2020 W-4 form online in Employee Self Service (ESS) between January 1 and January 3, 2020 at 6p

- ▶ **NOTE:** New 2020 W-4 will not be available in ESS until Jan. 1st!

2020 W-4 Form - Resources

- ▶ Updates to the Tax Withholding Estimator at www.irs.gov/W4app are underway – Individuals may consider using the estimator in the following scenarios:
 - ▶ Expect to work only part of the year
 - ▶ Have dividend, capital gain, or self-employment income or are subject to additional taxes
 - ▶ Prefer most accurate withholding for a multiple job situation
 - ▶ Prefer to limit information provided in steps 2 - 4 on the Form W-4 but do not want to sacrifice accuracy
- ▶ The State of Kansas Payroll Calculation Tool will be updated with the new tax calculations but may not be available by January 1, 2020
- ▶ **Reminder: Employees should direct specific tax questions to their personal tax advisor – agency HR/Payroll staff cannot provide tax advice to employees**

Sources: <https://www.irs.gov/newsroom/faqs-on-the-draft-2020-form-w-4>
<https://www.irs.gov/individuals/tax-withholding-estimator>



SHARP W-4 Impacts Fed Tax Data Changes

SHARP – Fed Tax Data Changes

- ▶ The changes to the Federal W-4 form require payroll systems to track the version of the Federal W-4 on which an employee's tax withholding must be calculated – **these changes will be applied in SHARP on Dec. 30th**
- ▶ The Fed Tax Data page in SHARP has been modified to include a new Federal Form W-4 Version box to select/display which Form W-4 tax calculation is in effect for the employee

A screenshot of a web form titled "Federal Form W-4 Version" with a help icon. Below the title are two radio button options: "2020 or Later" (which is selected and underlined with a red line) and "2019 or Earlier". The entire form is enclosed in a red rectangular border.


Federal Form W-4 Version ⓘ

☒ 2020 or Later ☐ 2019 or Earlier

- ▶ **The correct radio button must be selected as it determines the federal tax calculation used to calculate the employee's federal tax withholding**


SHARP – Fed Tax Data Changes


- ▶ The current Fed Tax Data Page in SHARP appears as follows for the 'Federal Withholding Elements' section:

*Effective Date 04/07/1989 

Updated By System Date Last Updated 03/02/2019

Federal Withholding Elements ?

*Special Withholding Tax Status None 


*Tax Marital Status Single  Single

☐ Check here and select Single status if married but withholding at single rate.

Withholding Allowances 0

Additional Amount \$0.00

Additional Percentage 0.000

*Earned Income Credit Status Not applicable 

☐ Exempt from FUT

Note: The Exempt from FUT will be moved to a new group box under Federal Unemployment Tax

SHARP – Fed Tax Data Changes

- ▶ On the new Fed Tax Data page, when the radio button “2019 or Earlier” is selected, the page displays fields pertaining to the current (2019) Form W-4:

The screenshot shows a web form titled "Federal Form W-4 Version" with two radio buttons: "2020 or Later" and "2019 or Earlier". The "2019 or Earlier" button is selected and highlighted in yellow. Below this is the "Federal Withholding Elements" section, which contains several fields: "*Special Withholding Tax Status" (dropdown menu set to "None"), "*Tax Status" (dropdown menu set to "Single" with the word "Single" also displayed to the right), a checkbox labeled "Check here and select Single status if married but withholding at single rate." (which is unchecked), "Withholding Allowances" (text input field with "0"), "Additional Amount" (text input field with "\$0.00"), "Additional Percentage" (text input field with "0.000"), and "*Earned Income Credit Status" (dropdown menu set to "Not applicable"). At the bottom left, there is a yellow button labeled "Federal Unemployment Tax" with a question mark icon. A blue callout box with a pointer to this button contains the text: "Note: The Exempt from FUT checkbox will be found by expanding this group box".

Federal Form W-4 Version ⓘ

☐ 2020 or Later ☒ 2019 or Earlier

Federal Withholding Elements ⓘ

*Special Withholding Tax Status

*Tax Status Single

☐ Check here and select Single status if married but withholding at single rate.

Withholding Allowances

Additional Amount

Additional Percentage

*Earned Income Credit Status

Federal Unemployment Tax ⓘ

Note: The Exempt from FUT checkbox will be found by expanding this group box

SHARP – Fed Tax Data Changes

- ▶ When the radio button “2020 or Later” is selected, the page displays fields pertaining to the 2020 Form W-4:

Federal Form W-4 Version ?

☒ 2020 or Later

☐ 2019 or Earlier

Federal Withholding Elements ?

*Special Withholding Tax Status

None



*Tax Status

Single



Single

☐ Multiple Jobs or Spouse Works

Dependent Amount

\$0.00

Other Income

\$0.00

Deductions

\$0.00

Extra Withholding

\$0.00

SHARP – Fed Tax Data Changes

- ▶ When the changes are applied to SHARP on Dec. 30th ALL Fed Tax Data rows (including future dated rows) will be converted to the “2019 or earlier” W-4 tax calculation as no 2020 W-4s will have yet been entered in the system
- ▶ For existing employees, the “2020 or Later” Form W-4 Version is only selected if/when a new effective dated row is entered **because a new 2020 Federal W-4 form is submitted:**
 - ▶ Agency staff must select the “2020 or Later” W-4 tax calculation when entering a submitted 2020 Federal W-4 form
 - ▶ If a new form is entered, agency staff **must also review and update any future dated rows that exist** by selecting and saving the “2020 or Later” W-4 tax calculation button to ensure the proper payroll calculation is used
- ▶ Statewide Payroll will run queries to verify that future-dated rows are updated to ensure the correct Federal W-4 tax calculation is selected

SHARP – State/Local Tax Data Changes

- ▶ For **NEW** employees hired on or after 1/1/2020, the system will default the Federal Form W-4 version to '2020 or Later'
- ▶ For **EXISTING** employees hired before 1/1/2020:
 - ▶ If an employee elects a state withholding tax change by submitting the appropriate State Withholding Tax form (i.e. Kansas K-4) but HAS NOT submitted a new 2020 Federal Form W-4, **the Federal Form W-4 Version on the new effective dated row remains “2019 or earlier”**
- ▶ **Reminder:** The Effective Date reflects the Federal, State, and Local tax elections that are in place for the employee at that point in time. **For existing employees, the effective date does NOT determine the Federal Form W-4 Version selection.**

SHARP – State/Local Tax Data Changes

- **Example:** An existing employee requests an update to State Tax Withholding effective 1/1/2020 but does not submit a new 2020 Federal W-4:

The screenshot shows the 'Tax Data' page in the SHARP system. At the top, there are three tabs: 'Federal Tax Data' (highlighted with a red box), 'State Tax Data', and 'Local Tax Data'. A blue box with an arrow points from the 'Federal Tax Data' tab to the 'State Tax Data' tab, containing the text 'Go to the State Tax Data page and make the necessary changes'. Below the tabs, the 'Tax Data' section displays the following information:

- Company: [Redacted]
- *Effective Date: 1/1/2020
- Updated By: Online Usr
- Date Last Updated: 02/28/2019

Below this is the 'Federal Form W-4 Version' section, which has two radio button options: '2020 or Later' and '2019 or Earlier'. The '2019 or Earlier' option is selected and highlighted with a red box. A red arrow points from the 'Federal Tax Data' tab to this selected option. A red box with the text 'Do not change this value' points to the '2019 or Earlier' option.

Below the W-4 version section is the 'Federal Withholding Elements' section, which contains the following fields:

- *Special Withholding Tax Status: None (dropdown menu)
- *Tax Status: Married (dropdown menu)
- Check here and select Single status if married but withholding at single rate. (checkbox)
- Withholding Allowances: 0
- Additional Amount: \$0.00
- Additional Percentage: 0.000

SHARP – Entering a 2020 W-4

- ▶ **To enter a new 2020 W-4 in Federal Tax Data:**
 - ▶ **Enter the effective date of the change**
 - ▶ NOTE: When a new row is added effective 1/1/2020 or later, the 2020 or Later radio button and Form W-4 fields will default
 - ▶ If the “2020 or Later” radio button is selected and the effective date is prior to 1/1/2020, an error message will be displayed:

Invalid Federal Form W-4 Version Selected. (2000,1501)

The Federal Form W-4 Version of “2020 or Later” is not valid for the Effective Date given on the Federal Tax Data Record. Correct the Federal Form W-4 Version to “2019 or Earlier” or change the Effective Date.

OK

SHARP – Entering a 2020 W-4

- ▶ Enter the Federal Withholding Elements based on the employee's submitted 2020 Form W-4:

Federal Withholding Elements ?

*Special Withholding Tax Status	None	Same choices as in prior years. Most common choice is 'None'
*Tax Status	Single	Value from Line 1(c)
	<input type="checkbox"/> Multiple Jobs or Spouse Works	Select checkbox if checkbox is selected in Step 2(c)
Dependent Amount	\$0.00	Value from Line 3
Other Income	\$0.00	Value from Line 4(a)
Deductions	\$0.00	Value from Line 4(b)
Extra Withholding	\$0.00	Value from Line 4(c)

Form W-4 **Employee's Withholding Certificate** OMB No. 1545-0074

Department of the Treasury Internal Revenue Service

► Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.
► Give Form W-4 to your employer.
► Your withholding is subject to review by the IRS.

2020

Step 1: Enter Personal Information

(a) First name and middle initial _____ Last name _____
Address _____
City or town, state, and ZIP code _____

(b) Social security number _____

► Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.

(c) ☐ Single or Married filing separately
☐ Married filing jointly (or Qualifying widow(er))
☐ Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)

Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the online estimator, and privacy.

Step 2: Multiple Jobs or Spouse Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

Do **only one** of the following.

(a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3-4); or
(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; or
(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld ☐

TIP: To be accurate, submit a 2020 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

Complete Steps 3-4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3-4(b) on the Form W-4 for the highest paying job.)

Step 3: Claim Dependents

If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):

Multiply the number of qualifying children under age 17 by \$2,000 ► \$ _____
Multiply the number of other dependents by \$500 ► \$ _____
Add the amounts above and enter the total here **3** \$ _____

Step 4 (optional): Other Adjustments

(a) **Other income (not from jobs).** If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income **4(a)** \$ _____

(b) **Deductions.** If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here **4(b)** \$ _____

(c) **Extra withholding.** Enter any additional tax you want withheld each pay period **4(c)** \$ _____

Step 5: Sign Here

Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

► **Employee's signature** (This form is not valid unless you sign it.) _____ **Date** _____

Employers Only

Employer's name and address _____ First date of employment _____ Employer identification number (EIN) _____

For Privacy Act and Paperwork Reduction Act Notice, see page 3. Cat. No. 10220Q Form **W-4** (2020)

SHARP – Entering a 2020 W-4 (Form View)

Federal Withholding Elements ?

*Special Withholding Tax Status

None

*Tax Status

Single

☐ Multiple Jobs or Spouse Works

Dependent Amount \$0.00

Other Income \$0.00

Deductions \$0.00

Extra Withholding \$0.00

SHARP – Entering a 2020 W-4 - Exempt

- ▶ The KPAY320 process will be run the morning of Dec. 30th AFTER the new changes have been applied to SHARP and will insert a new 1/1/2020 row with the following values for any employee with a Special Withholding Tax Status = 'Exempt':
 - ▶ Federal Form W-4 Version = 2020 or Later
 - ▶ Special Withholding Tax Status = None
 - ▶ Tax Status = 'Single' with no other adjustments
- ▶ A SHARP Infolist message will be sent when the KPAY320 processing is completed. Upon receiving that notice, agency staff can enter paper 2020 Federal W-4 forms received from employees with an effective date of 1/2/2020. To be effective with the first paycheck in January, 2020 the exempt status must be entered before 6p on Friday, Jan.3rd.

SHARP – Entering a 2020 W-4 - Exempt

- ▶ Fed Tax Data Special Withholding Tax Status must be entered as “Maintain taxable gross” - this status will track a taxable gross but no tax will be withheld
- ▶ To ensure accurate data entry, the Fed Tax Data page will now ‘grey out’ fields when certain Special Withholding Tax Status values are entered
- ▶ Note: Entry of any amount in ‘Extra Withholding’ for the Maintain Taxable Gross status will result in two ‘Warning’ messages as IRS instructions do not allow an individual claiming exempt to request an amount for ‘Extra Withholding’

SHARP – Entering a 2020 W-4 - Exempt

- ▶ Data Entry on Fed Tax Data for employee claiming 'Exempt' status

Federal Withholding Elements ?

*Special Withholding Tax Status

Maintain taxable gross

Select Tax Status of
Maintain taxable gross

*Tax Status

Single

Value from Line 1(c)

☐ Multiple Jobs or Spouse Works

Dependent Amount

\$0.00

Other Income

\$0.00

Deductions

\$0.00

These fields are
greyed out for
an employee
claiming Exempt

Extra Withholding

\$0.00

Two warning messages
will be received if any
amount is entered here
for employee claiming
Exempt status

SHARP – Entering a 2020 W-4 - Exempt

- ▶ If an amount is entered in Extra Withholding, the following warning is issued:

Warning -- Extra Withholding is not permitted. (2000,1504)

A value should not be entered for Extra Withholding when Special Withholding Tax Status is "Maintain taxable gross".

OK Cancel

- ▶ After selecting 'OK', a second warning is issued:

Warning -- Extra Withholding is not allowed when Special Tax Status is "Maintain taxable gross". (2000,1505)

You should remove the Extra Withholding amount if exempt status is required, or set Special Withholding Tax Status to "None" or "Nonresident alien".

OK Cancel

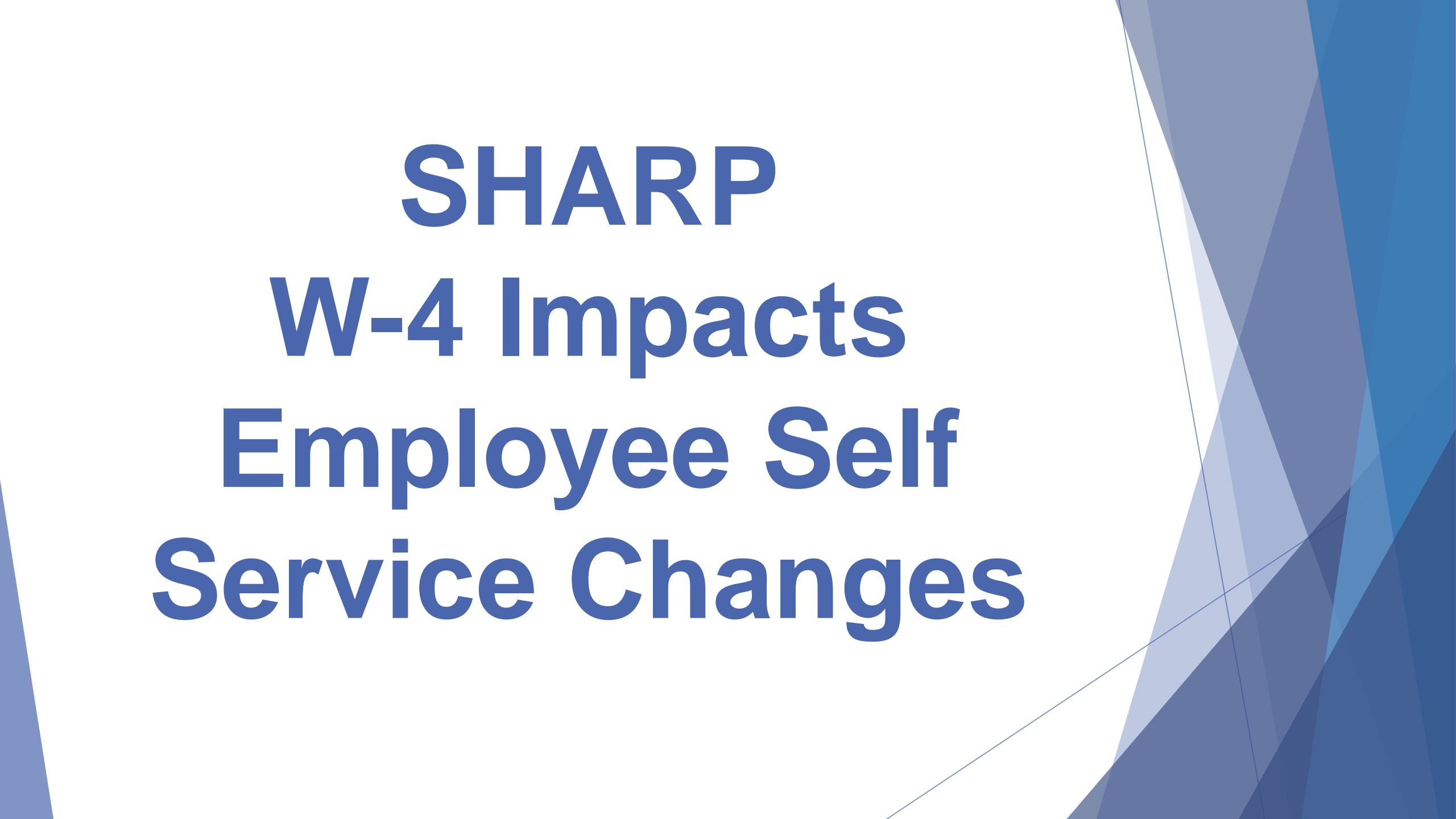
- ▶ **Select 'OK' to correct Special Tax Status and/or to obtain corrected W-4 form from employee**

SHARP – Fed Tax Data for New Hires

- ▶ The Fed Tax Data row and the W-4 version (2019 or 2020) for a new hire will be inserted based on the effective date
 - ▶ Effective date prior to 1/1/2020 will default to "2019 or earlier"
 - ▶ Effective date of 1/1/2020 or later will default to "2020 or Later"
- ▶ Agencies with new hires with Fed Tax Data effective dates on or after January 1, 2020 should wait to enter Fed Tax Data for those employees until the system updates are in production on Dec. 30, 2019 and the correct version of the Federal 2020 W-4 can be elected

REGENT AGENCIES ONLY – NRAs on MRI

- ▶ The KPAY320 program will be executed the morning of Dec. 30th AFTER the new changes have been applied to SHARP and will insert a new 1/1/2020 Non-Resident Alien Federal Tax Status row with the Filing Status = 'Single' for all employees with a 2019 status of 'Non-Resident Alien'
- ▶ New Fed Tax Data rows submitted by regent agencies via the MRI for non-resident alien employees with an effective date of on or after 1/1/2020 will default to the '2020 or Later' Federal W-4 version with a Filing Status = 'Single'
- ▶ Regent agencies are reminded that the '8233' indicator on the tax data records should be updated once a Form 8233 for calendar year 2020 has been submitted

The background features abstract, overlapping geometric shapes in various shades of blue, primarily on the right side of the slide, creating a modern, layered effect.

SHARP

W-4 Impacts

Employee Self

Service Changes

SHARP – Employee Self Service W-4

- ▶ On January 1, 2020, Employee Self Service (ESS) will allow on-line access to complete the new 2020 W-4
- ▶ Employees can click on the View Instructions icon in ESS to get more information on how to complete Step 2, 3 and 4 of the W-4
- ▶ Employees may need to reference additional information or worksheets from the IRS.gov website to accurately complete the on-line W-4 form
- ▶ It is recommended that employees consult a tax attorney or tax specialist for guidance in completing the Federal W-4 to best meet the unique tax situation of the employee

SHARP – Employee Self Service W-4

► ESS Form W-4 Step 1:

W-4 Withholding Certificate

Social Security Number

State of Kansas

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.
Your withholding is subject to review by the IRS www.irs.gov.

Step 1: Personal Information

Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.

Address

II

Filing Status

☐ Single or Married filing separately

☒ Married filing jointly (or Qualifying widow(er))

☐ Head of Household (Check only if you are unmarried and pay more than half the cost of keeping up a home for yourself and a qualifying individual).

SHARP – Employee Self Service W-4

► ESS Form W-4 Step 2:

Complete Steps 2 through 4 ONLY if they apply to you. To see if you are exempt from withholding or you have concerns about your privacy, see instructions for Form W-4 on the IRS website.

Step 2: Multiple Jobs or Spouse Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all these jobs.

 [View Instructions](#)


☐ Multiple Jobs or Spouse Works

Expandable 'View Instructions' links provide additional information to employee about completing the W-4 form

SHARP – Employee Self Service W-4

► ESS Form W-4 Step 3:

Step 3: Claim Dependents

 [Hide Instructions](#)

Once instructions have been reviewed, employee can click 'Hide Instructions'

To qualify for the child tax credit, the child must be under age 17 as of December 31, must be your dependent who generally lives with you for more than half the year, and must have the required social security number. You may be able to claim a credit for other dependents for whom a child tax credit can't be claimed, such as an older child or a qualifying relative. For additional eligibility requirements for these credits, see Pub. 972, Child Tax Credit and Credit for Other Dependents. You can also include other tax credits in this step, such as education tax credits and the foreign tax credit. To do so, add an estimate of the amount for the year to your credits for dependents and enter the total amount in Step 3. Including these credits will increase your paycheck and reduce the amount of any refund you may receive when you file your tax return.

If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):

Multiply the number of qualifying children under age 17 by \$2,000

Multiply the number of other dependents by \$500


Other tax credits

Total

SHARP – Employee Self Service W-4

► ESS Form W-4 Step 4:

Step 4: Other Adjustments

 [Hide Instructions](#)

(a) Other Income. If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income. You should not include income from any jobs.

(b) Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet and enter the result here.

(c) Extra withholding. Enter any additional tax you want withheld each pay period.

(a) Other Income

(b) Deductions

(c) Extra Withholding

SHARP – Employee Self Service W-4

► ESS Form W-4 'Claim Exemption':

Claim Exemption from Withholding

I claim exemption from withholding for the year and I certify that I meet

BOTH of the following conditions for exemption from withholding:

Exemption Conditions

- Last year I owed no federal income tax.
- This year I expect to owe no federal income tax.

☒ Check this box if you meet both conditions to claim exemption from tax withholding

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

Submit

SHARP – Employee Self Service W-4

- ▶ If an employee attempts to enter an Extra Withholding amount in Step 4(c) and checks the 'Claim Exemption' checkbox, the following error message will appear and the employee will have to make corrections before submitting the form in ESS:

You cannot claim dependents or other adjustments and also claim exemption from withholding.

You must remove the dependents and other adjustments or deselect the checkbox to claim exempt from withholding.

OK

SHARP Transition Timeline

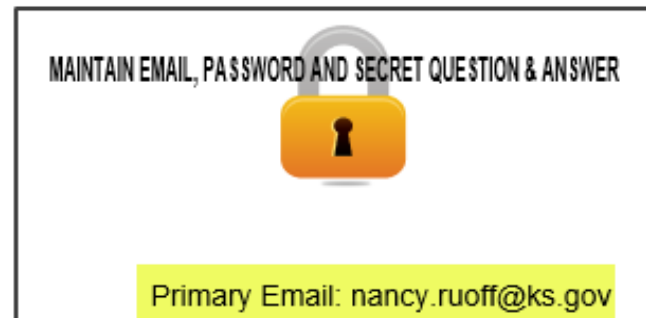
SHARP – Transition Timeline

- ▶ SHARP Testing of system changes – Currently in process
- ▶ Agency notification to Exempt employees – Should be in process
- ▶ Agency distribution of 2020 W-4 Employee Letter to ALL employees – Should be in process
- ▶ SHARP System updates – Overnight Dec. 29, 2019
- ▶ SHARP execution of KPAY320 to insert 1/1/2020 Fed Tax Data rows – Morning of Dec. 30, 2019 (after system updates are complete)
- ▶ Agency entry of employee-submitted 2020 W-4 Forms begins – Dec. 30, 2019 after notification via SHARP Infolist of completion of KPAY320
- ▶ SHARP - 2020 Federal W-4 available in Employee Self Service – Jan. 1, 2020

Payroll Reminders

Payroll Year-End Reminders

- ▶ Submit agency DA-180 Payroll Adjustment forms to Statewide Payroll ASAP – the final off-cycle for 2019 W-2 paychecks is Tuesday, Dec. 24th
- ▶ Agency HR/Payroll/Finance staff are encouraged to work together to ensure correct classification of employee vs. independent contractor and dual employment scenarios
- ▶ Please encourage agency employees to consider consenting to receive their 2019 W-2 electronically via Employee Self Service – it's quick, secure, and convenient!
- ▶ The **TENTATIVE date** for the W-2 Final load is currently scheduled for Jan. 2nd
- ▶ Please remind all employees to review and update (if necessary) the primary e-mail address in the 'My System Profile' tile of Employee Self Service as this is the e-mail address to which all W-2 electronic consent notifications will be sent



DA-184 Direct Deposit Security Reminders

- ▶ HR/Payroll staff are the first and last line of defense to protect employees from requests for fraudulent direct deposit changes
- ▶ The updated DA-184 form is available in Employee Self-Service or in person from the agency HR office – e-mail the form only after validating requestor
- ▶ The updated DA-184 **should not be posted to agency websites!**
- ▶ To best protect employees, the agency validation section at the bottom of the form **MUST** be completed for **ALL** requested direct deposit changes
- ▶ Receiving the DA-184 form from an e-mail that appears to be from the employee is no longer an acceptable method of validation
- ▶ If a fraudulent direct deposit is identified, contact statewide payroll as soon as possible to maximize the potential for recovery of the funds

DA-184 Direct Deposit Valid Form

- ▶ The updated DA-184 form is the only version that can be accepted and includes/requires completion of the below agency certification section:

State of Kansas
Department of Administration
DA-184 (Rev. 04-2017)

**OLD VERSION -
No Longer Valid
DO NOT ACCEPT**

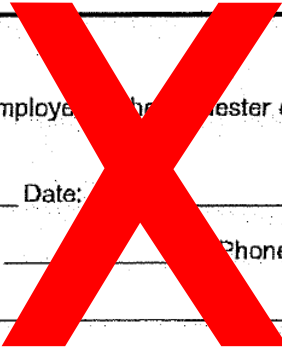
Section B: Agency Certification

I, the undersigned, certify that I have verified the employee is the requester of the change of information and that the information is true and correct.

Signature: _____ Date: _____ Print name: _____

Agency number: _____ Department ID: _____ Phone number: _____

Method of verification: _____



State of Kansas Department
of Administration DA-184
(Rev. 09-2019)

**NEW VERSION -
Accept and
Certify this
version only!**

(electronic signature is not acceptable)

Section B: Agency Certification

I, the undersigned, certify that I have verified the employee is the requester of the change of information and that the information is true and correct.

Signature: _____ Date: _____ Print name: _____

Agency number: _____ Department ID: _____ Phone number: _____

(Check One)

☐ Verified requested changes in person using employee identification (preferred method)

☐ Verified requested changes with employee using known employee phone number



Any Questions?

Contact Info:

Nancy Ruoff, Manager

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